Run Your Entire Field Sales Operation with LeadSquared Mobile App

A Webinar by
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Director Sales, LeadSquared
Key Features of LS Mobile App

1) Check in / Check out
2) Manage Leads / Tasks / Activities on the go
3) Smart Views on mobile
4) Geo Location Tracking
5) Leads Near me
6) Offline Mode
7) Reports & Dashboards
Check in / Check out

- Helps you Manage Attendance
- Helps you in managing Time spent for a meeting
- Auto Check In
- Auto Check Out
Check In – Check Out

- Enable location services from the mobile device
- Allow the app to track location.
- The report “Field Sales Tracker” which is available on the web client will help sales managers view the path travelled by the sales users.

Reports home:

>>User activity Reports
>>Field sales tracker
Auto Checking-In & Out

- Leads
  - V. Fgyy: Opportunity, 95 days ago
  - C: Opportunity, 44 days ago
  - S: Opportunity, 14 days ago
  - GM: Opportunity, 12 days ago
  - Cookies got it: Opportunity, 20 days ago

- Dashboard
  - My New Leads
  - My Leads with Pending Tasks
  - My Engaged Leads
  - Activity permission
  - sequel restricted
  - Some activity

- Checked-in
  - Your work day has begun. Location tracking is now active.
  - Checked In: 10:34 AM
  - 0 min(s)

- Check-in
  - Reminder to check-in!
  - Your scheduled time to begin work is coming soon. Tap on check in now to begin your work day early.

- Checked-out
  - Your work day has ended. Location tracking is no longer active.
Location Improvements & Fake location detection
Managing Leads/Activities / Tasks

- Add New leads
- Create New Tasks
- Update Calls/Meetings
- Complete Pending Tasks
- Call / SMS to the Lead
- Set Automated Emails based on Activity
Add new lead

Lead Details

First Name
Last Name
Email
Phone Number
Mobile Number
Lead Stage
Owner
Lead Source

Enter the Lead details

Save
Smart View on Mobile App

- Using Smart Views to Manage - Focused Leads
- Smart Views for Tasks
- Offline Access to Smart Views
Smart Views

- **Lnm3**
  - Lnm3@lsqdev.in
  - LNM
  - Acc. ID: 20504

- **Dashboard**
- **Leads**

**Smart Views**
- My New Leads
- My Leads with Pending Tasks
- My Engaged Leads
- My Customers
- Activities NO ACCESS

**My Leads with Pending Tasks**

- **Dawn Dums**
  - 379 d
  - No activity since 15 Mar 17
  - Customer
  - Prospect
  - 0

- **Amit Singh**
  - 58 d
  - Site visit scheduled 2d ago
  - Prospect
  - 0

- **Hozier**
  - 238 d
  - Site visit scheduled 2d ago
  - Free User
  - 0/10

- **Mohit**
  - 12 d
  - Had a Phone Conversation 6d ago
  - Prospect
  - 0/10

- **Sheela**
  - 370 d
  - No activity since 23 Mar 17
  - Prospect
  - 0/10

- **Harish**
  - 42 d
  - No activity since 14 Feb 18
  - Prospect
  - 0/10

**My Leads with Pending Tasks**

- Leads with Tasks Overdue + Task Due to Today
- Added by System on 22 January 2018 at 12:00 AM

- **Tab Type**: Lead

- **Conditions applied**
  - Task of lead is ANY type and status is pending today
  - or
  - Task of lead is ANY type and status is overdue
Geo Location Tracking

➢ Track Real Time Location of Sales Reps

➢ Track Location for where the Activities are Update

➢ Track the Routes Map

➢ Track the distance travelled
Field Sales Tracker Report

<table>
<thead>
<tr>
<th>Activity</th>
<th>Lead</th>
<th>Location</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHECKIN</td>
<td></td>
<td>A6-95, Nathupur, Sector 24, Gurugram, Haryana 122010, India</td>
<td>09-May-2017 10:16</td>
</tr>
<tr>
<td>CHECKOUT</td>
<td></td>
<td>A6-95, Nathupur, Sector 24, Gurugram, Haryana 122010, India</td>
<td>09-May-2017 21:44</td>
</tr>
</tbody>
</table>

Total distance covered - 105.6 km.
Offline Mode

1) Work Offline
   1) Add New Leads
   2) Complete Pending Tasks
   3) Update Activities
   4) Smart view Offline

2) Auto Sync Data when you are Online
Notifications

- Notifications on
  - New Lead Assignment
  - New Task / Pending Task
  - Reminders on Pending Tasks
  - Reminder to Check In / Check Out
Get a push notification on the shared lead instantly, user can view the lead directly from the notification.

User can always refer to the notes on the shared lead from the notification screen.
Performance Monitoring

➢ Dashboards

➢ Reports
THANK YOU